**CASTA Notes from the CDOT February 1, 2017, 5311 Sub Committee Meeting**

During the last 5311 Sub Committee meeting the group started pulling together around a possible solution that may provide the transparency and fairness that is the goal.  Despite everyone’s desire for a simple formula solution the diversity of the agencies in Colorado makes a one size fits all formula impossible.

**The solution that is beginning to emerge has the following parts:**

1. Agencies are grouped into size categories based on vehicle revenue miles, riders, 2014 budget, total revenue hours and cost per hour.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Revenue Miles** | **Systems** | **Riders** | **Systems** |
| **Small** | < 100,000 miles | 12 | <20,000 | 11 |
| **Medium** | 101,000 - 200,000 | 8 | 20,000 - 100,000 | 10 |
| **Large** | 200,000 - 999,000 | 10 | 100,000 - 1,000000 | 9 |
| **Very Large** | > 1,000,000 | 4 | >1,000,000 | 4 |
|  |  |  |  |  |
|  | **Cost** | **Systems** | **Revenue Hours** | **Systems** |
| **Small** | < 500,000 | 14 | < 7,500 | 13 |
| **Medium** | 500,000 - 1,500,000 | 10 | 7,501 - 25,000 | 8 |
| **Large** | 1,500,000 - 5,000,000 | 7 | 25,001 - 50,000 | 9 |
| **Very Large** | > 5,000,000 | 3 | > 50,000 | 4 |

|  |  |  |  |
| --- | --- | --- | --- |
| **SMALL** | **MEDIUM** | **LARGE** | **VERY LARGE** |
| Wet Mountain | SRDA | San Miguel Co. RTA « | Vail « |
| Dolores Co. Seniors | City of Cripple Creek | Town of Breckenridge | ECO |
| Canyon City GAC | SCCOG | *Black Hawk/Central City* | Summit Stage |
| *Archuleta County* | SUCAP (plus 5310) | Durango T | Mtn Village Tram & Bus\*\* |
| Montezuma Co. Seniors | *Rural Larimer-Weld service* | Town of Winter Park | RFTA\*\* |
| City of La Junta | *Estes Park* | Steamboat Springs Transit |  |
| *Teller County (was 5310)* | GVTA | Snowmass |
| Neighbor-to-Neighbor | All Points Transit » |  | \*\* Could also each be counted as a "group of one" as they are quite different from the others. |
| ECCOG | Glenwood Ride |
| Prowers County » | NECALG » |
| SRC | CB Mountain Express |
| Via » |  |

1. Within each size category agency budgets are used to calculate each agency's’ share (percentage) of the pot allotted to their category-this becomes their base award

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Category** | **% of Budget** | **Budget** | **Funding** |
| Agency A | Small | 50% | $150,000 | 75,000 |
| Agency B | Medium | 30% | 600,000 | 180,000 |
| Agency C | Large | 15% | 2,000,00 | 300,000 |
| Agency D | Very Large | 4% | 12,000,000 | 420,000 |

1. A percentage of the total funding would be held out of the total base amount to be awarded on various aspects of an agency's program, we have been calling these extra factors. Extra factors could include things like how many jurisdictions an agency serves, how much human services transportation they provide, the number of employment trips, low income population served etc.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Base | Extras\* | | | | Extra $ | Total |
|  |  | Juris | Rg Serv | Emp | HS$ |  |  |
| Agency A | $50,000 |  |  |  |  | 0 | $50,000 |
| Agency B | $50,000 | 1 | 1 |  |  | $50,000 | $100,000 |
| Agency C | $50,000 | 2 |  |  |  | $50,000 | $150,000 |
|  |  | \*each “extra” is worth $25K | | | |  |  |

**Discussion Items around this emerging solution:**

Size categories

* Sizing is critical -- agencies that are not sized properly their awards could be dramatically impacted.
* Should 5307 recipients be eligible for the “medium” category?
* *Are the size categories appropriate?*
* *OR should we be looking at other criteria to categorize the agencies?*

Budget base

* There are a few agencies that could lose 50% or more of their funding using a budget base.  Is there a way to make this more equitable-do we address the few and make it work or do we need to adjust the budget calculation process?

Extra factors

* Should equity-justified service be accounted for in the Extra factors or earlier in the process?
* Should each category have their own set of extra factors or should they be specific to each size category?
* Some factors do not have clear data sources-would agency self-reporting work in these cases?
* Should there be a floor where agencies under a certain budget amount should be held harmless?
* How can we ensure that the extra factors are allotted fairly? Can we make specific enough criteria for each factor that it is clear to CDOT how the points will be allocated and to agencies what they can do to achieve more points
* Should the transition plan have a percentage on either end?  For instance, no agency could get a funding increase of more than 5% or lose more than 5% of their funding as we transition.
* Would agencies be able to come up with the local match if they a large funding increase?
* Should agencies receiving large funding increases have to go through some process to demonstrate need
* OR is this type of formula to subjective and will it end up getting us back to the same scenario we are in today?

OTHER:

* Should it be required that local investment (match) stay at the same levels if an agency gets an increase in grant funds.
* What are appropriate timelines for transition plans?
* For transition plan at what rate should funding cuts be phased? Percentage per year e.g. 3% year 1, 5% year 2, 5% year 3, 7% year 4, 10% year 5, etc…. until an agency reached final funding amount?
* Should this be the same for increases?